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Great Practices
Richard Buller CPA Services, LLC

Resilience and a stick-to-it attitude allow one firm to rise above the chaos to achieve streamlined, melodic success

Richard Buller, CPA and owner of Richard Buller CPA Services, LLC, referred to the early years of firm ownership as "the crazy days." After purchasing a firm in 2007, Buller had no idea what was inside until he pulled back the wrapping.

"It was pure chaos," Buller stated. "None of the software worked together and there were no standard processes in place, so everyone was working differently. There was absolutely no collaboration among staff or with clients."

There was also no peace—among staff members and between staff and clients. Buller described a volatile work environment where frustrated employees and clients argued regularly.

“I remember walking into the office during those first few weeks and witnessing staff

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Starting with the Basics

“The firm was broken. That was for sure,” Buller stated. “I had to fix what was inside first if I expected to repair client relationships.”

So *fix* he did. Buller began making changes, and he started with the basics: electronic file storage and scanning.

Buller’s first action as the new firm owner was to implement Thomson Reuter’s FileCabinet CS (FCS). FCS would support a single repository to store documents so employees would know exactly where to find client files. This would both improve internal workflow and allow staff to quickly fulfill client requests.

“FileCabinet put all client documents at my staff’s fingertips. It was so much easier and organized.”

Scanning was the next big change. Buller made front-end scanning a mandatory process…and right in the middle of tax season!

“I couldn’t wait until after tax season to make changes that would surely improve the process,” said Buller. “Some staff were petrified at first, but after a short while, a few employees actually told me that things were better.”

A Lead-in to Bigger and Better Things

After implementing a few basic changes, Buller witnessed his firm turn a major corner. “There was more harmony among staff because we had diminished the frustration that came with using inadequate software.”

When he purchased the firm, Buller did an evaluation of the technology and found that none of the products worked together. The firm was using disparate apps from a

variety of vendors, including a third-party time & billing system that Buller had

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really hard that year to get all documents scanned in. We scanned during the day and worked remotely from home in the evening. VO allowed us to work collaboratively as a team—finally."

With the technology problem solved, Buller was able to move on to bigger items, like pricing. He admitted that no one really knew what to charge clients because everyone performed work differently. To make matters worse, more often than not, staff had no idea where a client's project was in the process.

"Once we started using Practice CS effectively, we could track client projects with pinpoint accuracy. This was a huge step in the right direction because once we had project management under control, I was able to implement value pricing and put an end to the pricing guessing game."

Efficient workflow, standardized processes, and a fully integrated software suite allowed Buller to set prices based on the value of the service, not on billable hours. "We weren't going to be truly profitable as long as we were billing by the hour."

Today, the firm's clients are happy, and so are staff members. There are no more yelling matches in the hallway.

"Our clients are now getting the efficient and dedicated service they deserve. We also have them set up on portals, which offers 24/7 access to their documents and data."

Buller fully understands that the Web is the way to go—the way today's clients want to work with their accounting professionals. "No one wants to drop off files in person or even call anymore. Clients want things to be easy. They are busy, and portals support a far more convenient way of working."

Specializing in the physician niche, Buller reported specifically that his doctor clients wouldn't want to work any other way. "Our doctors love the File Exchange

option in the portal. Communicating with us online simplifies the process, which is

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business model from the firm in Jennings to the new firm.

Richard Buller CPA Services, LLC is a great example of what can come when the right changes are implemented—and you stick to your guns. By applying the basics, such as integrated software and standard processes, and making new processes mandatory firm wide, he turned a once chaotic office into a thriving and smooth operation.

"If I was able to turn my firm around, I believe anyone can do it," Buller asserted. "I faced the same issues as many firms, like outdated technology, but I would guess that most firms didn't have staff and clients in screaming matches. If we can go from that level of chaos to harmony, other firms can too."

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About the Author

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